



Creating Invoices

To handle invoicing, and payments, Zoho FSM has built-in integration with [Zoho Invoice](#). This will allow you to conveniently and quickly create invoices for your work orders and offer a secure way to your contacts to make payments. This means your billing times are greatly reduced, resulting in immediate payments and realization of revenue.

Work Order-level Invoicing

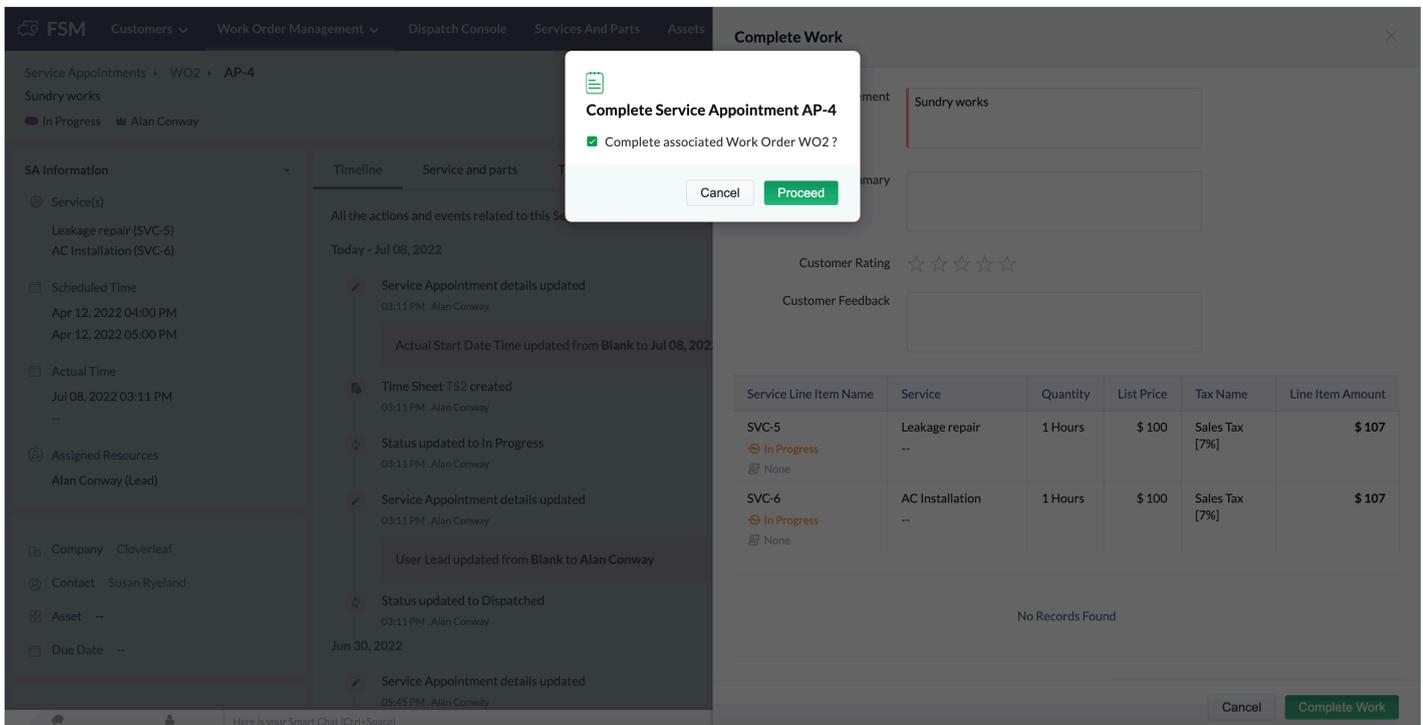
In Zoho FSM, **invoices** can be created at the **work order-level** for each of the service line items in a work order.

Work order-level invoicing will facilitate the following:

- Ability to generate an invoice for an individual service line item of a work order or for multiple service line items of a work order
- Ability to generate an invoice for service line items from different appointments
- Invoices can be created for the service line items even without creating appointments for them
- All invoices for a work order can be seen and managed from a single place

Characteristics of Work Order-Level Invoicing

- An invoice can be generated for a service line item irrespective of the status (Open, In progress, Completed) associated with it
- Irrespective of the invoice status of a work order, it can be marked as **Completed** and subsequently **Closed** after all the appointments associated with it have been completed.



- The **Service line items** in a work order will have the following statuses that correspond to the work status of the service line item.
 - Open
 - In progress
 - Completed

The Service line items in a work order will also have the following statuses that correspond to the billing status of the service line item.

- **Not yet Invoiced:** No invoice has been created for the service line item
- **Invoiced:** An invoice has been created for the service line item
- **Void:** The billing status of the work order has been marked as [Void](#).
- **Non Billable:** The billing status of the work order has been marked as [Non Billable](#).

Work Orders > WO11
Sundry repairs

New Medium Service Partially Invoiced Mary Cooper

Cancel Edit

Work Order Details

- Requests --
- Estimates --
- Parent Work Order --

Company & Contact

- ABC Services
- Ms. Lucy Robins
- lathav.spring@gmail.com
- 111-111-1111

Asset

- Asset --

Address

- Territory Colona
- Service Address
- Service Address
- 4117 Kennedy Dr
- East Moline, Illinois, 61244,
- United States
- Email lathav.spring@gmail.com
- Billline Address

Timeline **Service and parts** Appointments Notes Related list Invoices

Services

| Service Line Item Name | Service | Quantity | List Price | Tax Name | Line Item Amount |
|------------------------|------------------|----------|------------|---------------|------------------|
| SVC-25 | Leakage Repair | 1 Hours | \$ 80 | SalesTax [7%] | \$ 85.6 |
| | In Progress | | | | |
| | Invoiced | | | | |
| SVC-26 | Plumbing | 1 Hours | \$ 100 | SalesTax [7%] | \$ 107 |
| | Open | | | | |
| | Not yet Invoiced | | | | |

Parts

| Part Line Item Name | Part | Quantity | List Price | Tax Name | Line Item Amount |
|---------------------|----------------------------|----------|------------|---------------|------------------|
| PRT-25 | Waterproof Tile Gap Filler | 1 Pack | \$ 20 | SalesTax [7%] | \$ 21.4 |
| | Service Line Item SVC-25 | | | | |
| PRT-26 | Beehive Max Toilet Plunger | 1 Each | \$ 30 | SalesTax [7%] | \$ 32.1 |
| | Service Line Item SVC-26 | | | | |

Sub Total \$ 230
Tax Amount \$ 16.1

While creating an invoice, you can filter the service line items using its billing status.

Create Invoice

Select the services to which you want to generate invoice. You can generate invoice(s) for a single service or combine two or more services and generate invoice.

| <input type="checkbox"/> | Service ID | Service Name | Appointment | All Status | All Billing Status |
|--------------------------|------------|----------------|-------------|-------------|--------------------|
| <input type="checkbox"/> | SVC-25 | Leakage Repair | AP-7 | In Progress | Invoiced |
| <input type="checkbox"/> | SVC-26 | Plumbing | - | Open | None |

- The **Invoices** created for the service line items will have the same status as the ones used in Invoice/Books (Draft, Sent, Pending Approval, Approved, Rejected, Pending, Partially Paid, Paid, Overdue, [Void](#), Write Off, Signed, Closed).

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Reports

Work Orders > WO11
Sundry repairs
New Medium Service Partially Invoiced Mary Cooper Cancel Edit

Work Order Details
Requests --
Estimates --
Parent Work Order --

Company & Contact
ABC Services
Ms. Lucy Robins
l.com
111-111-1111

Asset
Asset --

Address
Territory Colona
Service Address
Service Address
4117 Kennedy Dr
East Moline, Illinois, 61244,
United States
Email lathav.spring@gmail.com
Billing Address

Timeline Service and parts Appointments Notes Related list **Invoices**

Invoices + Create

| Invoice Number | Status | Date | Due Date | Total | Balance |
|----------------|--------|--------------|--------------|--------|---------|
| INV-000005 | paid | May 17, 2022 | May 31, 2022 | \$ 107 | — |

- The **Work Orders** will have a **Billing Status** that will be determined based on the invoices created for the service line items in the work order.
 - **Not Yet Invoiced:** When no invoice has been created for any of the service line items of the work order
 - **Partially Invoiced:** When at least one of the service line items of the work order is invoiced
 - **Invoiced:** When all the service line items of the work order have been invoiced.
 - **Partially Paid:** When all the service line items are invoiced and at least one of the invoices has been paid.
 - **Paid:** When all the invoices created for the service line items of the work order have been paid.

Apart from the statuses mentioned above, work orders can also have the billing status **Non Billable**, or **Void**.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Reports

Work Orders WO11
Sundry repairs
New Medium Service **Partially Invoiced** Mary Cooper

Cancel Edit

Work Order Details
Requests --
Estimates --
Parent Work Order --

Company & Contact
ABC Services
Ms. Lucy Robins
111-111-1111

Asset
Asset --

Address
Territory Colona
Service Address
4117 Kennedy Dr
East Moline, Illinois, 61244, United States
Email lathav.spring@gmail.com
Billline Address

Timeline Service and parts Appointments Notes Related list **Invoices**

Invoices + Create

| Invoice Number | Status | Date | Due Date | Total | Balance |
|----------------|--------|--------------|--------------|--------|---------|
| INV-000005 | paid | May 17, 2022 | May 31, 2022 | \$ 107 | -- |

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Workforce Reports

Standard Trial Upgrade

Filter Work Orders All Work Orders Create

| Work Order Name | Summary | Status | Billing Status | Priority | Territory | Contact | + |
|-----------------|-----------------------|-----------------------|-----------------------|----------|-----------|----------------|---|
| WO36 | Pest Control | Scheduled Appointment | Not yet Invoiced | | Zylker | Lucy Robins | |
| WO35 | Bathroom repair | New | Invoiced | Medium | Zylker | Lucy Robins | |
| WO34 | Plumbing | Scheduled Appointment | Partially Invoiced | | Colona | Lucy Robins | |
| WO33 | Sundry repairs | In Progress | Not yet Invoiced | Medium | Colona | Lucy Robins | |
| WO32 | Bathroom floor repair | Cancelled | Not yet Invoiced | Medium | Zylker | Lucy Robins | |
| WO31 | Pest Control | Completed | Not yet Invoiced | Medium | Zylker | Hercule Poirot | |
| WO30 | Plumbing | Cancelled | Not yet Invoiced | Medium | Zylker | Lucy Robins | |
| WO29 | Spring cleaning | Completed | Not yet Invoiced | Medium | Zylker | Lucy Robins | |
| WO28 | Plumbing | In Progress | Partially Invoiced | | Zylker | Burton Guster | |
| WO27 | Sundry repairs | In Progress | Partially Invoiced | Medium | Colona | Lucy Robins | |
| WO26 | End of lease cleaning | In Progress | Partially Invoiced | Medium | Colona | Lucy Robins | |
| WO25 | Sundry tasks | Dispatched | Not yet Invoiced | | Colona | Lucy Robins | |
| WO24 | Bathroom floor repair | In Progress | Invoiced | | Colona | Lucy Robins | |
| WO22 | Plumbing | Completed | Not yet Invoiced | | Colona | Lucy Robins | |

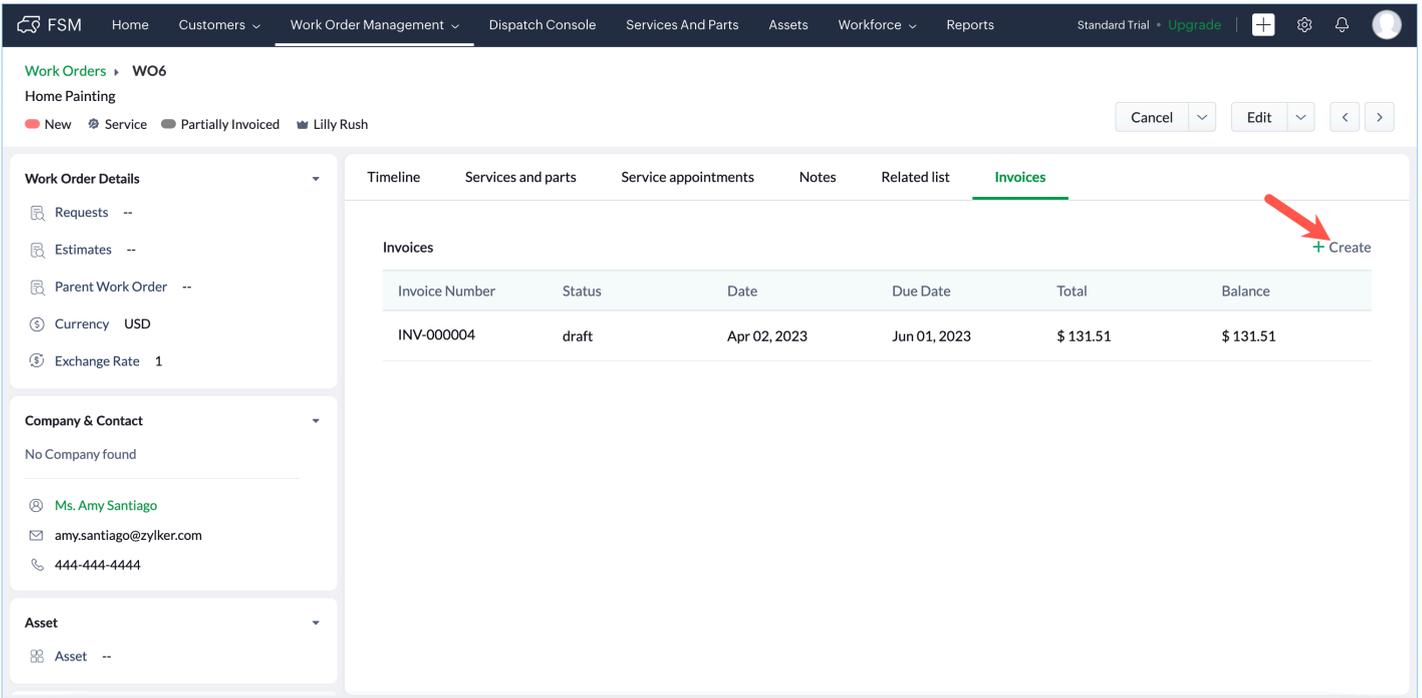
Clear Apply Filter Total records : ### < 1 > 100 Records per page

Create an Invoice

- Permission Required:** [Invoices](#)
- Find out the Edition-specific limits for [Invoices](#).

To create an invoice:

1. Select the **Work Orders** module from the **Work Order Management** menu and click the work order whose service line items you want to create the invoice for.
2. Under the **Invoices** tab, click **Create**.



The screenshot displays the FSM interface for Work Order Management. The main content area is titled 'Invoices' and contains a table with the following data:

| Invoice Number | Status | Date | Due Date | Total | Balance |
|----------------|--------|--------------|--------------|-----------|-----------|
| INV-000004 | draft | Apr 02, 2023 | Jun 01, 2023 | \$ 131.51 | \$ 131.51 |

A red arrow points to the '+ Create' button located in the top right corner of the Invoices section.

3. In the *Create Invoice* overlay, select the services you want to create the invoice for and click **Next**.
If an invoice has been generated for a service line item, then that service line item cannot be selected.

Create Invoice
✕

Choose Work Order WO6- Home Painting ↻

Work Order Details

WO6 - Home Painting

● New
 ⚙ Service
 ⌚ Amy Santiago
 ● Partially Invoiced
 👑 Lilly Rush

[View More](#) ↗

Select the services to which you want to generate invoice. You can generate invoice(s) for a single service or combine two or more services and generate invoice.

| | Service ID | Service Name | Service Appointment | Quantity |
|-------------------------------------|------------|---------------------------|---------------------|----------|
| <input type="checkbox"/> | SVC-15 | Painting - Exterior House | AP-3 | 1 |
| <input type="checkbox"/> | SVC-48 | Painting - Exterior House | - | 1 |
| <input checked="" type="checkbox"/> | SVC-50 | Painting - Exterior House | - | 1 |

Cancel
Next

4. Provide the necessary details and click **Generate Invoice**.

In the **Sales person** dropdown, the sales persons [added](#) in Zoho Books/Invoice will be listed under **Sales Persons** and all active Zoho FSM [users](#) will be listed under **FSM Resource**. The Payment Terms [set as default](#) for a customer in Zoho Books/Invoice will be populated here.

Create Invoice

Invoice Summary

Invoice Date: Aug 21, 2023

Payment Terms: Due on Receipt

Due Date: Aug 21, 2023

Sales person: Search Sales person

Services

| Service | Line Item Amount |
|-------------------|------------------|
| TV Installation | 210 |
| Add a Description | |

Parts

Previous Generate Invoice

The invoice will be created with the status **Draft**.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Workforce Reports Standard Trial Upgrade

Work Orders > WO6
Home Painting
New Service Invoiced Lilly Rush

Cancel Edit

Work Order Details

- Requests
- Estimates
- Parent Work Order
- Currency: USD
- Exchange Rate: 1

Company & Contact

No Company found

Ms. Amy Santiago
amy.santiago@zylker.com
444-444-4444

Asset

Asset

Invoices

| Invoice Number | Status | Date | Due Date | Total | Balance |
|----------------|--------|--------------|--------------|-----------|-----------|
| INV-000031 | draft | Aug 10, 2023 | Aug 10, 2023 | \$ 52.5 | \$ 52.5 |
| INV-000004 | draft | Apr 02, 2023 | Jun 01, 2023 | \$ 131.51 | \$ 131.51 |

5. Click the **Invoice Number** to open the invoice draft and click **Send Invoice**.

You can also record the payment. Click **Open In ZohoInvoice** to view the invoice in Zoho Invoice. The

billing address of the work order will be used here.

INV-000031 ×

[Open In ZohoInvoice](#)

Draft

Zylker
Alaska
U.S.A

Bill To
Ms. Amy Santiago
620 Atlantic Ave
Brooklyn
11217 New York
United States

INVOICE

INV-000031

Balance Due
\$52.50

Invoice Date : 10 Aug 2023
Terms : Net 30
Due Date : 10 Aug 2023

| # | Item & Description | Qty | Rate | Amount |
|---|---------------------------|---------------|----------------------|----------------|
| 1 | Painting - Exterior House | 1.00 Hours | 50.00 | 50.00 |
| | | | Sub Total | 50.00 |
| | | | Salestax (5%) | 2.50 |
| | | | Total | \$52.50 |
| | | | Balance Due | \$52.50 |

Notes
Thanks for your business.

More Information

Created By Lilly Rush
Created Time Aug 10, 2023 02:49 AM (GMT -07:00)
Work Order **WO6**

[Send Invoice](#) [Record Payment](#)

6. Click **Send** to dispatch the email.

By default, the checkbox for **Add Invoice PDF** will be selected. If you do not wish to include the invoice PDF in the email, deselect it. To rename the invoice PDF, click on its name and enter a new value. Click on **Attachments** to add any other files that you want to send in the invoice email. You can add up to three files each with a maximum size of 3 MB.

In the **To** field, you can use one of the following email addresses. Please note that all these email addresses will be fetched from your integrated finance organization.

- Contact email address
- Company email address
- Email addresses of the Company's Contacts

In the Cc and Bcc fields, along with the email addresses available in the **To** field, all active confirmed users will also be listed. To include any other email address, just type in the value and press **Enter**. In each of these fields, you can include a maximum of five email addresses.

Send Invoice ✕

From:

To: Bcc Cc ⓘ

subject:

Invoice #INV-000031

Dear Ms. Amy Santiago,

Thank you for your business. Your invoice can be viewed, printed and downloaded as PDF from the link below. You can also choose to pay it online.

INVOICE AMOUNT

\$52.50

| | |
|--------------|-------------|
| Invoice No | INV-000031 |
| Invoice Date | 10 Aug 2023 |
| Due Date | 10 Aug 2023 |

PAY NOW

Regards,
Lilly Rush
Zylker

Add Invoice PDF

PDF INV-000031 .pdf

📎 Attachments

Invoice Actions

The following options are available for an invoice under **more options** [⋮].

Download: You can download the invoice as a PDF

Print: You can print an invoice

Mark as Sent: When you email the invoice to the customer, the status of the invoice changes from *Draft* to *Sent*. If need be, you can mark the invoice as sent without sending the invoice to the customer. This option will be only available if the invoice is in the **Draft** state.



Draft

Zylker
Illinois
U.S.A

INVOICE

INV-000013

Balance Due
\$107.00

Bill To
ABC Services
901 1st St
Colona
61241 Illinois
United States

Invoice Date : 15 Jul 2022
Terms : Due end of the month
Due Date : 31 Jul 2022

| # | Item & Description | Qty | Rate | Amount |
|--------------------|----------------------------|---------------|-------|-----------------|
| 1 | Leakage Repair | 1.00 Hours | 80.00 | 80.00 |
| 2 | Waterproof Tile Gap Filler | 1.00 Pack | 20.00 | 20.00 |
| Sub Total | | | | 100.00 |
| SalesTax (7%) | | | | 7.00 |
| Total | | | | \$107.00 |
| Balance Due | | | | \$107.00 |

Notes

Send Invoice

Record Payment

- Download
- Print
- Mark as Sent



- The maximum number of invoices that can be created for a work order will depend on your [FSM edition](#). For a work order, you can create as many invoices as the service line items allowed for a work order.
- Whether created in web or mobile app, the invoices will be automatically synced with your Books/Invoice account.
- From the work order module, you will be able to see the various pre-defined work order views related to invoicing.

The screenshot displays the FSM Work Order Management interface. On the left, there is a 'Filter Work Orders' sidebar with various filters. The main area shows a table of work orders with columns for Status, Billing Status, Priority, Territory, Contact, and Company. A dropdown menu is open, showing 'All Work Orders' and several 'FAVOURITES' and 'PUBLIC VIEWS' options.

| | Status | Billing Status | Priority | Territory | Contact | Company | |
|---|--------|----------------|----------|-----------|---------|---------|--|
| <input type="checkbox"/> Adjustment | | | | | | | |
| <input type="checkbox"/> Asset | | | | | | | |
| <input type="checkbox"/> Billing Status | | | | | | | |
| <input type="checkbox"/> Cancellation Message | | | | | | | |
| <input type="checkbox"/> Cancellation Reason | | | | | | | |
| <input type="checkbox"/> Company | | | | | | | |
| <input type="checkbox"/> Contact | | | | | | | |
| <input type="checkbox"/> Currency | | | | | | | |
| <input type="checkbox"/> Discount | | | | | | | |
| <input type="checkbox"/> Discount Type | | | | | | | |
| <input type="checkbox"/> Email | | | | | | | |
| <input type="checkbox"/> Estimates | | | | | | | |
| <input type="checkbox"/> Exchange Rate | | | | | | | |
| <input type="checkbox"/> Grand Total | | | | | | | |
| <input type="checkbox"/> Invalid Data | | | | | | | |
| <input type="checkbox"/> Parent Work Order | | | | | | | |

| | Status | Billing Status | Priority | Territory | Contact | Company | |
|---|----------------|-----------------------|--------------------|-----------|---------|-------------|--------------|
| <input type="checkbox"/> All Work Orders | | | | | | | |
| <input checked="" type="checkbox"/> Invoiced Work Orders | Repairs | New | Partially Invoiced | Medium | Colona | Lucy Robins | ABC Services |
| <input checked="" type="checkbox"/> My Partially Paid Work Orders | Repairs | New | Partially Invoiced | Medium | Colona | Lucy Robins | ABC Services |
| <input checked="" type="checkbox"/> My Partially Invoiced Work Orders | Floor repair | New | -None- | Medium | Colona | Lucy Robins | ABC Services |
| <input checked="" type="checkbox"/> My Paid Work Orders | Faucet | Scheduled Appointment | -None- | Medium | Colona | Lucy Robins | ABC Services |
| <input type="checkbox"/> All Work Orders | House cleaning | Dispatched | -None- | Medium | Colona | Lucy Robins | ABC Services |
| <input type="checkbox"/> Cancelled Work Orders | Works | Closed | Invoiced | — | Colona | Lucy Robins | ABC Services |
| <input type="checkbox"/> Closed Work Orders | Faucet | Closed | -None- | — | Colona | Lucy Robins | ABC Services |
| <input type="checkbox"/> Completed Work Orders | | | | | | | |
| <input type="checkbox"/> WO1 | Sundry repairs | Scheduled Appointment | -None- | Medium | Colona | Lucy Robins | ABC Services |